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ABSTRACT

This report describes a mentoring pilot project developed by the Massachusetts Department of Education to meet the staff training and development needs of workplace educators in a National Workplace Literacy Program. The mentoring concept was chosen because one-on-one relationships between experienced and less experienced workplace educators were considered feasible and cost-effective. This report consists of two sections. In the first section, the mentoring pilot project is defined as part of the larger staff training and development for the literacy programs in Massachusetts. The first section also provides a chronology of the different stages of the mentoring pilot project from its inception through design and implementation to evaluation. The second section is the "Participant Notebook" that was given to mentors and mentees during their joint training prior to their 20-hour relationship. The notebook includes the training plan for the orientation of mentors and mentees and all training materials, such as lesson plans, learning activities, and case studies. Sample goal-setting forms and invitations to the reunion and evaluation session are included, along with a list of six resource persons. (KC)

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ED 363 740

Department
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WORKPLACE EDUCATION MENTORING PILOT PROJECT FINAL REPORT

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Developed by:

Bob Bozarjian - Donna Curry - Barbara Garner - Kevin Geary - Arthur Goodall
Marcia Hohn - Johan Uvin

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350 Main Street, Malden, Massachusetts 02148-5023 (617) 388-3300 • TTY: N.E.T. Relay 1-800-439-2370

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The Commonwealth of Massachusetts Department of Education

350 Main Street, Malden, Massachusetts 02148-5023

(617) 388-3300
(617) 388-3392 Fax

Robert V. Antonucci
Commissioner

September, 1993

I am pleased to present this report on the design, implementation and evaluation of a mentoring project for workplace educators that was developed and successfully implemented during fiscal year 1993 through our Massachusetts Workplace Education Initiative. The mentoring project was one of three staff development pilot projects. The other initiatives were a regional mini course and an agency- or partnership-based orientation program. These initiatives were designed in response to a United States Department of Education recommendation, an increase in requests for technical assistance, and partnership need.

With the development of these staff training and development programs, the Department has strengthened its leadership role in workplace education within the Commonwealth, as well as within the nation. Accomplished as a joint effort of the field and Department staff, these pre- and in-service programs are the first of their kind in Massachusetts and belong to the very few developed elsewhere in the nation. They represent an outstanding example of the Department's theme: "Working Together for Better Results."

We are confident that with these staff training initiatives we have begun an exciting but challenging journey that will further support workplaces in their progression towards becoming high-performance work organizations, and, at the same time, will enhance the quality of services which ultimately benefits the adult learner.

Sincerely,

Robert V. Antonucci

Robert V. Antonucci
Commissioner of Education

ACKNOWLEDGEMENTS

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Donna Curry, Bob Bozarjian, Johan Uvin
Massachusetts Workplace Education Initiative, System for Adult Basic Education Support, Acton Public Schools

WORKPLACE EDUCATION RESOURCE SERIES:

Workplace Education Mentoring Pilot Project Final Report
17419-82-150-9/93-DOE

Workplace Education Sample Evaluation Report
17420-30-150-9/93-DOE

Workplace Education Mini-Course Pilot Project Final Report
17421-44-150-9/93-DOE

Transforming the Training Manual into a Learning Experience
17422-19-150-9/93-DOE

Math in the Workplace
17423-20-150-9/93-DOE

Learning Differently in Adult Education: Development of a Learning
Disabilities Component At Hampden Papers, Inc.
17424-43-150-9/93-DOE

The Role of Counseling in Workplace Education:
Educational and Career Counseling at New England Medical Center
17425-66-150-9/93-DOE

September 15, 1993

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INTRODUCTION

The main purpose for writing this final report is to document the process and outcomes of a mentoring pilot project designed by the Massachusetts Department of Education to meet the staff training and development needs of workplace educators in the National Workplace Literacy Program.

Mentoring was chosen by a limited number of smaller programs located in remote areas of the state over other staff training and development options because one-on-one relationships between experienced and less experienced workplace educators seemed a feasible and cost-effective model.

The report consists of two main sections. In the first section, the mentoring pilot project is defined as part of the larger staff training and development effort for NWLP programs in Massachusetts. The first section also provides a chronology of the different stages of the mentoring pilot project from its inception over design and implementation to evaluation. The second section is the Participant Notebook that was given to mentors and mentees during their joint training prior to their 20-hour relationship. This notebook includes the training plan for the orientation of mentors and mentees and all training materials. Resources are included for people who are interested in further exploring mentoring as a staff training and development option. Additional materials are included in the Attachments.

Throughout the writing of this report, readers of drafts pointed out that the report fulfills a training function in addition to mere process documentation. They said that, although written as an account of one staff training and development pilot project for a limited number of partnerships, the report clearly demonstrates the relevance and replicability of the mentoring process at a larger scale and in different contexts.



OVERVIEW OF MENTORING PROJECT

I. OVERVIEW OF STAFF DEVELOPMENT PILOTS

The Mentoring Pilot Project is one of three staff development components of the Massachusetts Department of Education National Workplace Literacy Program (NWLP). The purpose of the Workplace Literacy Program is to provide grant money to improve the productivity of the workforce through improved literacy skills needed in the workplace.

The staff development component was added to the Workplace Literacy Program for three major reasons:

1. It was recommended by the U.S. Department of Education.
2. There was a need expressed by all seven partnerships involved in the Workplace Literacy Program.
3. There was an increase in the number of requests for technical assistance.

The Massachusetts Department of Education developed a set of underlying principles that would be applied to all staff development components. These principles included:

- ✓ Aim ultimately at improving the skills of workplace educators so that learners would be better served
- ✓ Build on the experience that is available in the field
- ✓ Build a pool of qualified NWLP educators
- ✓ Develop, pilot, and document customized models of staff development to accommodate the diversity of partnerships
- ✓ Involve the field in all phases of the staff development process: planning, implementation, and evaluation
- ✓ Build the capacity of the field to do its own staff development
- ✓ Acknowledge the wide range of options staff can choose to meet their needs

From these underlying principles and from partnership need came the creation of three pilot staff development activities designed for partnerships involved in the Workplace Literacy Program:

1. An agency-based training program
2. A regional mini-course
3. A mentoring project

The Mentoring Project was designed by a team with representative from the field, the Department of Education, and SABES (System for Adult Basic Education Support). Experts from education, business, industry, and labor convened to offer their advice on mentoring. From the information gathered over the course of several months of meetings, the team refined the overall assumptions and made them more specific for the Mentoring Project:

- ☛ The ultimate goal of staff training and development in workplace education is to enable workplace educators to better meet the needs of learners.
- ☛ Staff training and development for workplace education is more than training teachers for their roles. It is about nurturing the growth of workplace educators who are knowledgeable in the wide range of issues. It takes a holistic view of the workplace environment and the roles of people in it.
- ☛ Mentoring is only one way to meet the staff training and development needs of workplace educators.
- ☛ Staff training and development models/options are overlapping and should be viewed as interrelated, not as isolated activities.
- ☛ The collegial nature of the mentorship model makes it particularly well-suited to addressing individual practitioner and program needs and to explore the more subtle and complex issues in depth.
- ☛ The relationship between mentor and mentee is a formal one, with a beginning and an end.
- ☛ The mentorship model, as it is defined in this context, includes an orientation to the relationship for both mentors and mentees, on-going support for mentor/mentee partnerships, an evaluation of the experience, and the identification and training of new mentors from the current group.

- ☐ Partners in the mentorship model will make choices about what areas they would like their joint work to focus on and determine how. Options will be explored during the orientation session. The needs of the mentees, however, will drive the determination of content and will facilitate matchmaking.
- ☐ It is understood that participants in staff development activities (both mentors and mentees) are equal partners from the perspective of the Department and SABES in exploring and evaluating the effectiveness and feasibility of mentoring as a staff development option for workplace education.
- ☐ Participation in the mentoring program is voluntary.

II. PHASES IN THE MENTORING PILOT PROJECT

The Mentoring Project involved five major phases:

1. Design
2. Recruitment/Selection
3. Orientation/Training
4. Implementation
5. Support
6. Evaluation/Reunion

1. Design

During the Design Phase, a team was formed to draft an overall design. The team solicited feedback from a group of experts from education, industry, and business. These experts represented diverse fields. Participating companies included Digital Equipment Corporation, United Electric Controls, New England Medical Center, Boston Partners in Education, Inc., Cambridge Community Services, and the Commonwealth Literacy Campaign. Experts suggested the following as key components of a successful mentoring program:

- ✓ Identify resources, expertise
- ✓ Establish support system
- ✓ Develop norms
- ✓ Establish roles and expectations
- ✓ Ensure effective communication skills
- ✓ Evaluate relationships

During this phase an introductory packet and needs assessment were also developed. The needs assessment was to be used to determine strengths and weaknesses of individuals - both mentors and mentees - participating in the mentoring program.

2. Recruitment/Selection

Criteria: The Recruitment/Selection Phase was possibly the most important, as well as most challenging, step. Five individuals--instructors and/or coordinators--representing three Workplace Literacy Programs volunteered for the Mentoring Project. Twenty-four individuals wishing to participate as mentors also submitted their needs assessment forms. From this bank of recruits, the facilitator paired mentors and mentees. The expressed needs of the mentees (from their needs assessment forms) were paired with the avowed expertise of the mentors.

The facilitator had hoped to be able to also consider location in pairing individuals, but because of the specific needs of mentees, this could not be done. Most mentees expressed a need to become more proficient in designing curriculum and conducting literacy audits and other forms of literacy assessments. Of the submitted forms by mentors, only two highlighted expertise in both curriculum development and conducting literacy audits; another seven individuals expressed expert knowledge in curriculum development but not literacy audits.

Commitment: Along with completing the needs assessment form showing interest in the Mentoring Project, the design team felt that both the mentors and mentees should be committed to the project by:

- ✓ Participating in a five-hour orientation/training session
- ✓ Meeting for a total of twenty hours with partner
- ✓ Attending a three-hour reunion/evaluation session
- ✓ Interacting with the project facilitator for any support needs

Participation was voluntary, but mentors were paid a stipend for their time. (Mentees were not paid extra because the mentoring project would be considered part of their paid staff development time.)

3. Orientation/Training

Purpose: The third phase of the project was the orientation or training session. There were several purposes for the all-day session:

- ☐ To provide an overview of the Mentoring Project
- ☐ To clarify roles and expectations of all involved
- ☐ To practice communication and interrelation skills
- ☐ To give pairs (or triplets) an opportunity to get to know each other

The training session resulted in clarifying the roles of both the mentors and the mentees. As a large group, participants cooperatively developed "Rules of Thumb" to follow in implementing their mentor/mentee relationships. Individuals left the training session with suggestions on how to evaluate their relationship as well as a list of strategies for completing twenty hours of meeting time.

The training session was well-received, although most participants felt there should have been more time available to become more comfortable with their partner(s).

4. Implementation

Phase four of the Mentoring Project was the actual implementation by the mentors and mentees. Each pair/triplet committed to meet for a total of twenty hours.

Goals: This commitment included a goal setting session in which the mentee and mentor developed a set of goals that could be accomplished within a ten-week time period. Goal setting forms included three questions to guide mentoring pairs:

- ☐ What concrete skills do I hope to learn?
- ☐ What specific information do I hope to gain?
- ☐ What 'intangibles' would I like to be exposed to?

Mentees wished to learn the following concrete skills:

- ✓ *Taking information from task analysis and developing specific/relevant lesson plans*
- ✓ *Learn about different ways to gather information for future development of lesson plans*
- ✓ *What goes into starting an ESL workplace program*
- ✓ *To improve the GE workplace curriculum*
- ✓ *Learning how to establish a GED program within the context of workplace education*

Partners used the twenty hours to visit each other's workplace education sites and also to talk over the phone about specific issues or questions mentees had. Using the phone turned out to be an added benefit since each of the mentoring pairs was at a minimum one hour's drive apart.

5. Support

Critical to the success of the project was the support phase. Project participants knew that the project facilitator was always accessible should an issue arise. If she did not hear from a mentoring pair within a reasonable amount of time, she would initiate the phone call. This support served as a formative evaluation allowing

participants to continually improve.

6. Evaluation/Reunion

The final phase of the Mentoring Project was summative evaluation. This was accomplished by a three-hour session which also served as a reunion for all the participants to come together to share their experiences. The agenda for the evaluation session was driven by the participants--what was effective and what wasn't.

Based on the discussions during the evaluation/reunion sessions, both mentors and mentees were pleased to have been a part of the Mentoring Pilot and hoped to see such projects continue in the future. Mentors and mentees alike felt that their goals had been met, and, in many cases, exceeded. A mentor summed up her involvement in the project by stating,

" ... What is special about this project for me is having a noble reason to step back from my daily activities. What better opportunity than mentoring to take a fresh look at ESL workplace programs, to try to describe processes and draw conclusions about what is unique about workplace education experience!... "

They shared what worked and what presented a challenge:

What worked:

- ✓ Materials and ideas: Receiving materials and ideas from the mentor worked for individuals. Also sharing materials from the students with the mentors was effective.
- ✓ Visiting site: Having the mentor come to the mentee's site; it helped both to focus on the mentee's specific worksite and students. Because of this, goals for some of the mentees were set AFTER the mentor visited the site. It also allowed the mentee to re-focus: the discussions brought back the mentee back "on track".

Visiting other worksites (not necessarily those of the mentee or the mentor) was an effective means of learning more about workplace education, according to some of the mentees.

- ✓ Matching: Pairing of individuals (for the most part) worked well.
- ✓ Other fields: Learning about other adult education "fields" (i.e., GED vs. ESL) was an unanticipated, but positive experience.

- ✓ Phone conversations: Talking on the phone helped since mentor and mentee pairs often worked and lived many miles apart. Phone conversations were used by some to discuss pertinent issues. Some mentees asked to reserve the right to call their mentors.

What proved challenging:

- ☐ Distance: For all participants distance was an issue.
- ☐ Project lifetime: The project lifetime was tight; the consensus was that the project should have been spread out for a longer time period.

Mentees felt they needed longer time with their mentors to talk about what worked after implementing ideas. Again, this related to the short duration of the project. For example, a mentor might suggest an idea which the mentee would then implement. It often takes time to see the effect of an implementation strategy, and mentees felt the tight lifetime of the project did not allow for reflection of implementation.

- ☐ Titles: The title of "mentee" vs. "mentor" was again discussed as a negative. The two terms seemed to evoke a sense of one individual being superior to or more knowledgeable than another. In reality, both mentor and mentee are very knowledgeable and each has a lot to share with the other.
- ☐ Time to implementation: The time lag between when individuals were asked if they wanted to participate and the time when the project finally began was an issue. Some mentees stated that in two or three months time between beginning the project their needs changed.
- ☐ Matching issue: Some felt that the gap between mentor and mentee was too wide. For example, there is sometimes a large gap between an individual with hands-on experience and an individual who has been an administrator/manager for a period of time. Some mentees felt that anyone interested in becoming a mentor should have relevant, current experience in the workplace.

During the evaluation/reunion session, individuals also shared unanticipated outcomes:

Unexpected Outcomes:

- ☛ Mentees learned that they were "not in as bad a shape as originally thought". They learned that they were already doing what should be done. In some cases, writing down what they were doing provided the feedback they needed to know they were on the right track.

- ☞ The mentoring process allowed participants to connect to other resources, including workplace educators.
- ☞ The general consensus was that the mentoring relationship turned into a "collegial" relationship rather than a mentor/mentee relationship.
- ☞ One mentoring pair learned that GED testing could be administered on site--even at a worksite.
- ☞ Mentors mentioned that the process was as much of a learning experience as it was for their mentees. Rather than the mentors providing the support, often it seemed that the roles were reversed. This was a very positive, yet unexpected outcome.
- ☞ Many comments by both mentors and mentees suggested that the mentoring process became an opportunity to accept new challenges not directly related to the mentoring process itself.
- ☞ Unexpected outcomes included the opportunity to visit other worksites, especially those that were industries that were unfamiliar. Participants appreciated the opportunity to learn how other programs were operating in other areas of the state. Discussions covered a wide variety of areas, including salaries of adult educators in workplace education.

III. NEXT STEPS

- ✓ Needs assessment form: The needs assessment form needs to be revised. A question should be added: "What are you involved in now?" The needs assessment form should request more information from interested participants. Also, the form should clearly spell out the time commitment needed for the success of this program.
- ✓ "Bailing out": Have well-defined process in place in which an individual could "bail out" of the project due to incompatibility. It is difficult to know if there is a match until the pair meets, and there could be personality conflicts.
- ✓ Time period: According to most participants, the project should run for longer period of time (6 months at least). This would give more time for pairs to develop a relationship as well as time to try out new strategies.
- ✓ Training: Provide training session only AFTER pair has gotten to know each other. Participants felt that they needed a session BEFORE the actual training workshop. This earlier session would enable pairs to

become more familiar with each other before the "real work" begins.

- ✓ Implementation: The mentoring process should include more site visits, according to some participants. They also suggested that any new mentoring project involve those participants who have been involved in the pilot project. Pairs should be free to be creative in how they meet their time commitment for the program.
- ✓ Evaluation: The evaluation process should include time for individuals to share materials and strategies. During the pilot project more energy was spent on evaluating the process of mentoring rather than on materials sharing.
- ✓ Commitment: There needs to be a way to ensure commitment of participants. Possible strategies included interviewing prospective participants and having participants sign a contract.
- ✓ Costly!!! How do we make the project more cost-effective? Or how can the project be revamped in order to get more mileage out of less money.



**Department
of Education**

*Meeting the Staff Development Needs of Workplace
Educators Through Mentoring*

**MENTORING PILOT PROJECT
PARTICIPANT NOTEBOOK**

**Bob Bozarjian - Donna Curry - Barbara Garner
Kevin Geary - Arthur Goodall - Marcia Hohn
Johan Uvin**

**NATIONAL WORKPLACE
LITERACY PROGRAM
(ROUND IV)**

1992-1993

**Developed by the Massachusetts Department of Education under the U.S. DOE National
Workplace Literacy Program in Collaboration with the Massachusetts Workplace Education
Initiative and the System for Adult Basic Education Support**

**OVERVIEW OF GRANT
NATIONAL WORKPLACE LITERACY PROGRAM**

ROUND IV

JULY 1992 - DECEMBER 1993

MASSACHUSETTS DEPARTMENT OF EDUCATION
NATIONAL WORKPLACE LITERACY PROGRAM (ROUND IV)

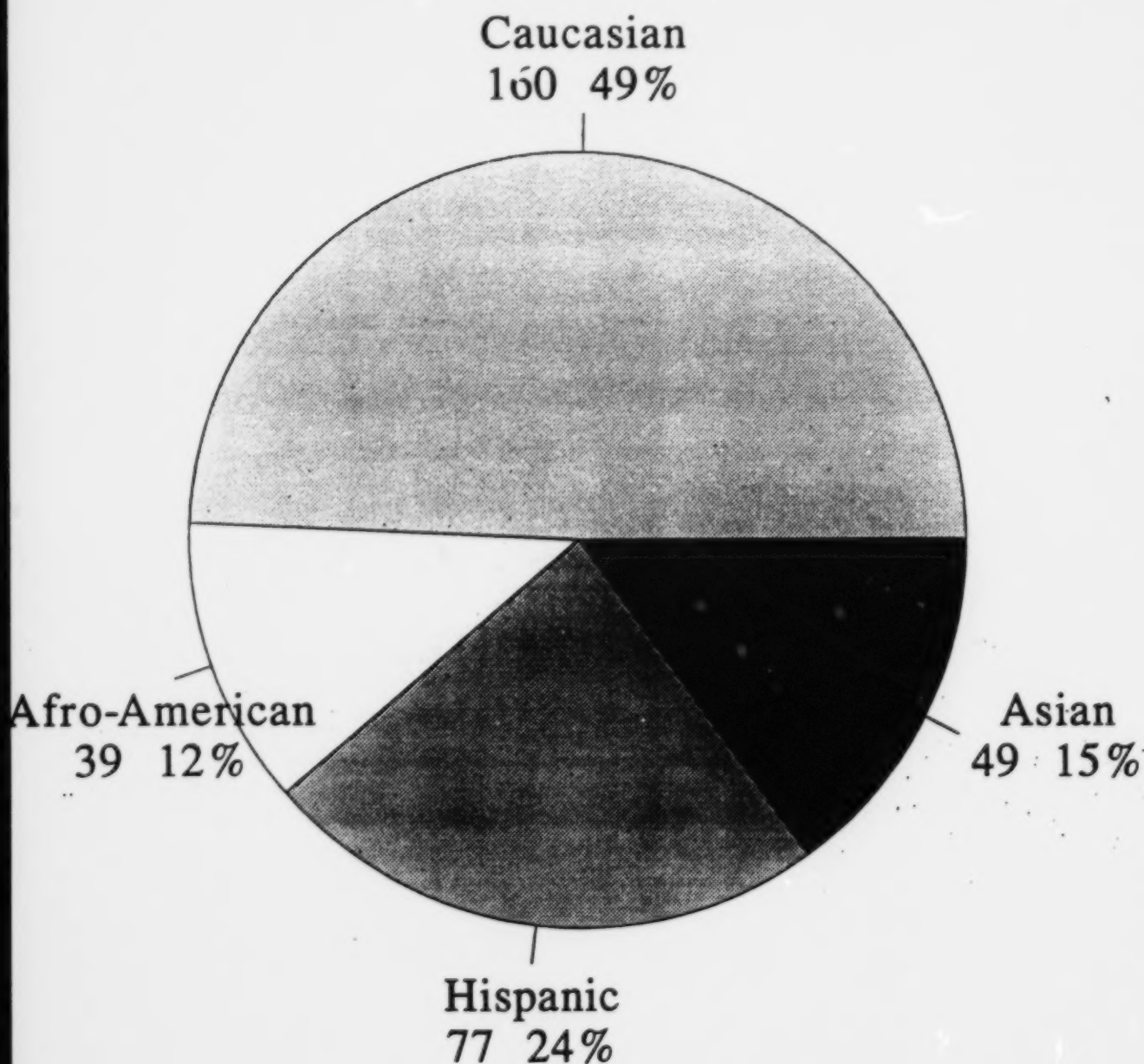


CHART 1: ETHNICITY OF PARTICIPANTS

MASSACHUSETTS DEPARTMENT OF EDUCATION
NATIONAL WORKPLACE LITERACY PROGRAM (ROUND IV)

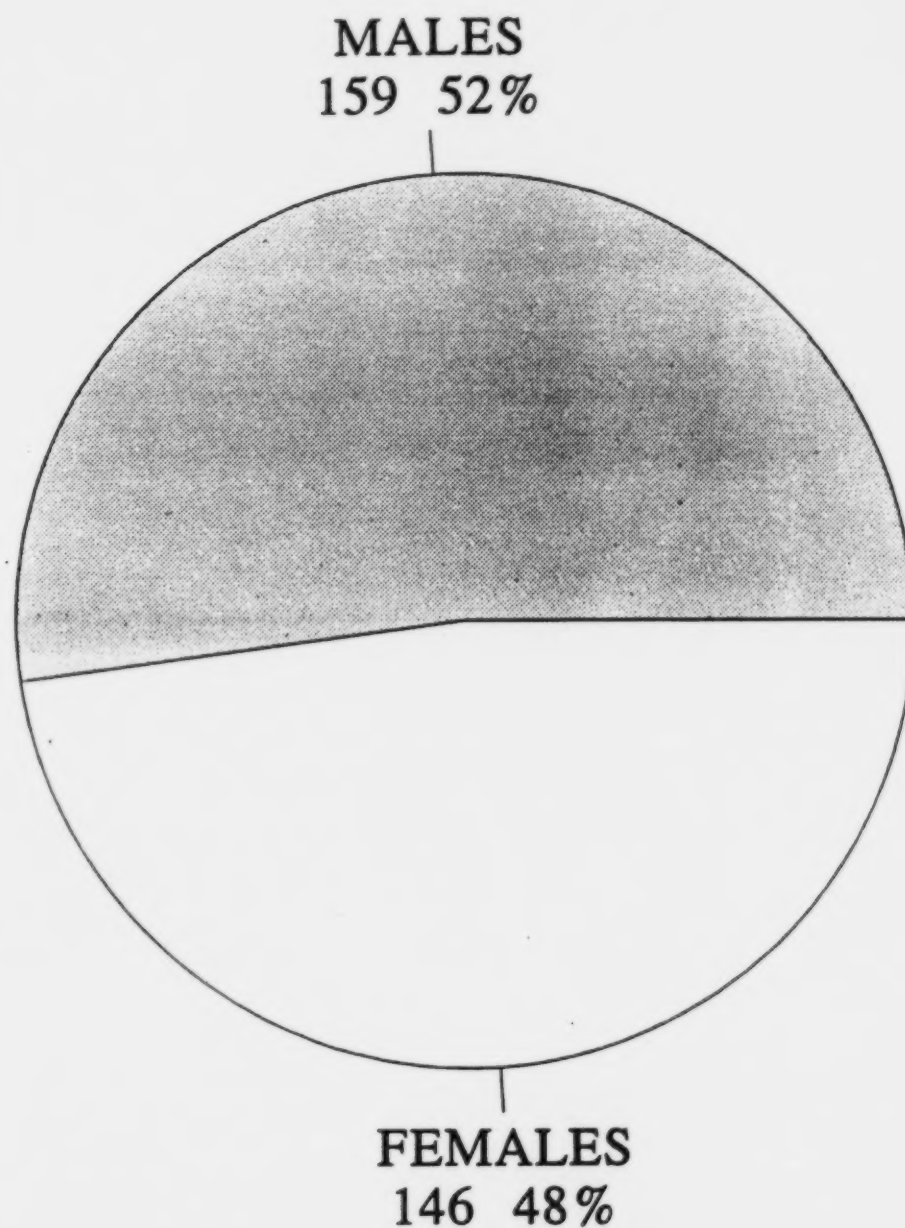


CHART 2: GENDER OF PARTICIPANTS

MASSACHUSETTS DEPARTMENT OF EDUCATION

NATIONAL WORKPLACE LITERACY PROGRAM (ROUND IV)

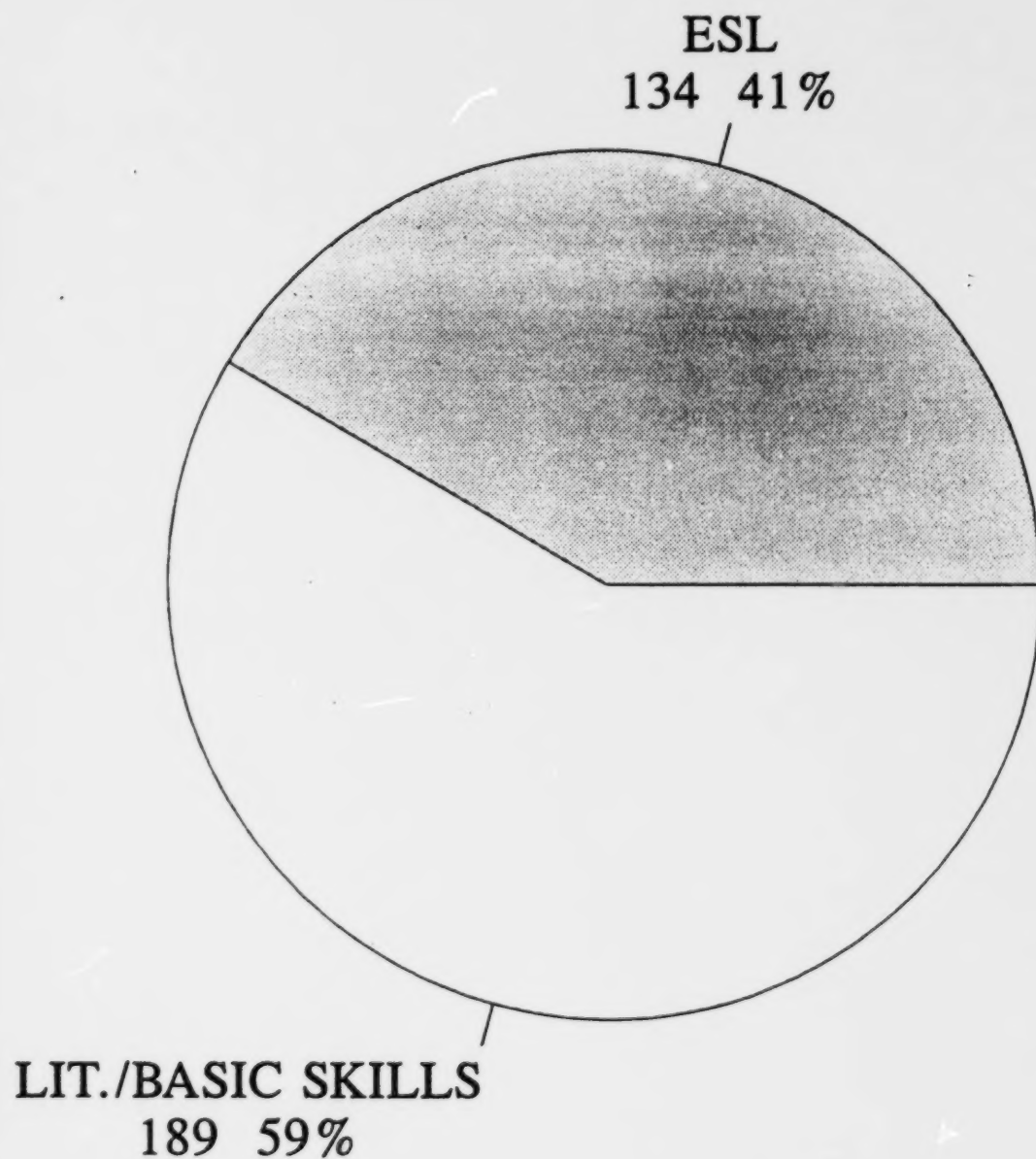


CHART 3: PARTICIPANTS PER PROGRAM COMP

**OVERVIEW OF STAFF DEVELOPMENT PROGRAM
OVERVIEW AND CALENDAR FOR MENTORING PILOT PROJECT**

OVERVIEW OF STAFF DEVELOPMENT PROGRAM

1. Rationale

The rationale for the Staff Development Program is three-fold:

1.1. Recommendation by U.S. Department of Education.

■ The Bureau received the following recommendation in response to its proposal to the U.S. Department of Education for Round IV of the National Workplace Literacy Program:

"... Use funds to cover the costs of a staff development plan. Note that this is for staff of this project at all sites. The plan is to be a systematic effort to provide additional training in literacy audits, curriculum development, evaluation and assessment for workplace literacy instruction. It is not acceptable to incorporate conferences (...) that are attended customarily by staff. Plan and develop original training that must include face-to-face training and may not be limited to distribution or development of training materials."

"... The plan should contain systematic methods of training teachers and other staff in areas related to the workplace literacy project activities such as additional training in job task analysis, curriculum development, or working in the corporate culture."

Source: Funding Documentation for Grants and Cooperative Agreements V198A20305, U.S. DOE, April 3, 1992.

■ In response, the Department designed a work plan for staff development.

1.2. Partnership Need.

■ During site visits in October 1992, all 7 partnerships expressed an urgent need for initiatives that would meet the staff training and development needs of their staff. The field visits also revealed that the diversity of programs in terms of program design, program timelines, program resources, type of services provided, staffing patterns, experience and qualifications would make it virtually impossible to identify one staff training or development model that would accommodate the idiosyncrasies of the 17 worksites involved.

- Discussions also revealed that few partnerships were offering formal and workplace education specific training and on-going staff development activities to their staff.

- Staff also clarified that their needs implied more than teaching including areas such as program development, curriculum development including assessment and evaluation, and program administration.

- Three possible models emerged from these initial discussions:

- a mentorship program where the needs of one-staff programs could be met using a one-on-one model;

- an agency-based orientation and staff development program including a partnership/company-specific component to address the needs of staff working at different sites but for the same agency; and

- a regional mini-course to address the needs of program staff in areas where the geographic distribution of programs was as such that it seemed feasible from a cost-effectiveness point of view to address the needs of practitioners from several partnerships simultaneously.

- The initial site visits also revealed that substantial amounts of expertise were locked up in a few partnerships or programs. This expertise would be worthwhile sharing through the dissemination of resources or through the involvement of more experienced staff in training and staff development design and implementation.

- Learning providers also identified the lack of a labor pool of qualified workplace educators they could recruit from.

To confirm the findings of these informal needs assessment activities, a survey was sent out. The majority of programs responded and repeated the same needs and same ways to address them as those identified in the initial site visits.

1.3. Increase in Requests for Technical Assistance.

- An increasing number of requests for technical assistance were communicated to the Department. As many requests addressed recurring themes, the Department decided to be pro-active by addressing these requests systemically instead of addressing needs individually in a reactive mode.

2. Underlying Principles

Based on the the initial site visits and the findings of the survey, the Department inferred general principles that should underlie the design and implementation of a systematic staff training and development program. The program should:

- **aim ultimately at improving the skills of workplace educators** to ensure responsiveness and quality of the services they provide adult learners with;
- **build on the experience that is available** by involving experienced providers and staff in training and through the sharing of information on successful practices (e.g. through developing and disseminating resources that document successful practices);
- **build a pool of qualified workplace educators** by training experienced project staff as trainers;
- **develop, pilot, and document customized models** that accommodate the idiosyncrasies of partnerships;
- **involve the field** in the design, implementation and evaluation of staff development models;
- **build the capacity of the field** to do its own staff training and development by disseminating information on how to develop customized models for staff training and development;
- **acknowledge the wide range of options** staff can select to meet their needs.

3. Overall Goals and Design

☐ Using these guiding principles, the Department allocated the necessary resources to develop and implement a (pilot) staff development program and approached the System for Adult Basic Education Support (S.A.B.E.S.) with the request to collaborate on the developmental work that needed to be accomplished.

☐ In December of 1992, the Department and SABES confirmed the feasibility of developing and implementing pilot projects for staff training and development. At this meeting, the following two overall goals were set for the pilot phase:

- (1) **to ensure the quality and continuous improvement of the workplace education delivery system, in general, and the NWLP, in particular; and**
- (2) **to build the capacity of the delivery system to respond to the growing demand for work-related education.**

☐ The Department and SABES confirmed that during the pilot stage activities should include a mentoring project for beginning workplace educators, an agency-based training program for workplace education staff, and a regional mini-course for professionals and para-professionals. A timetable was set for the pilot (Spring of 1993) and for its evaluation (Summer 1993).

☐ In preparation for the pilot stage, subcommittees were established for each of the pilots consisting of project staff, SABES staff, and Department staff. The Department's Workplace Education Coordinator for the National Workplace Literacy Program was assigned to coordinate the efforts of the subcommittees.

☐ The Department then solicited applications from business leaders, labor officials, education providers, and learners who would like to share their experiences and expertise with developing programs. The rationale behind this request was to establish a pool of qualified mentors, trainers, or resource persons that programs and the Department could draw from in planning current and future training of workplace education staff.

☐ Both the Department and SABES realized that in addition to the pilot projects, the Department should continue to facilitate staff development initiatives and provide additional kinds of support. To date, these initiatives have included:

- ☛ A Coordinator Support Network (monthly);
- ☛ A Sharing Network for All NWLP Staff (quarterly);
- ☛ An Orientation for Planning and Evaluation Teams (3 hrs.);
- ☛ A Training in Data Analysis for Planning and Evaluation Teams (5 hrs.);
- ☛ Two Statewide Sharing Sessions for Planning and Evaluation Teams (2 X 5 hrs.);
- ☛ On-Site Support to Planning and Evaluation Teams through Partnership Evaluation Resource Persons (20 hrs.).

4. Design of Mentoring Project

☐ The Mentoring Project was designed by a committee consisting of representatives from the field, the Department, and S.A.B.E.S. Input was solicited from a team of mentoring experts from education, business, industry, and labor who were brought together for a one-time only meeting in December 1992.

☐ According to the expert team, the underlying philosophy of the Mentoring Project should be that staff development can be and is more than pre-service training of teachers. It is about using a variety of learning arrangements to nurture the growth of workplace educators. It takes a holistic view of the workplace environment. This means that the distinction between workplace

education teachers, trainers, coordinators, and administrators has become less relevant. Instead, a new view and profile of the workplace educator is used that looks at workplace education staff as professionals who can handle a multiplicity of tasks involving teaching, development, coordination, and administration.

☐ Based on expert input, the design committee also decided that the Mentoring Project should be viewed as a formally-structured and highly-supported relationship between a mentor and a mentee(s) to ensure a high level of commitment. The emphasis in this relationship is on coaching rather than on the provision of mere technical assistance, although technical assistance is an integral part. In this relationship an individual experienced in one specific area of Workplace Education or mentor is paired up with and works with one or more practitioners or mentees who have less experience in the specific area. Both mentor and mentee(s) go through a training, parts of which are joint activities.

☐ Using the expert input, the design committee finalized its workplan and timetable:

No	WHAT	WHO	WHEN	HOW LONG
1	DRAFT DESIGN OF TRAINING	SUBCOMMITTEE	JAN 22	2 HRS
2	SOLICIT FEEDBACK FROM LARGER GROUP ON EARLY DESIGN: REALITY CHECK & ENRICHMENT OF DESIGN (WHAT TO WATCH OUT FOR, INCLUDE THIS/THAT, REACH CONSENSUS)	SUBCOMMITTEE + EXPERT TEAM OF PEOPLE IN THE FIELD OF MENTORING	FEB 11	2 HRS
3	FINALIZE DESIGN OF PILOT BASED ON OUTCOMES OF 2.	SUBCOMMITTEE + FACILITATOR	FEB 17 (NEXT MEETING)	5 HRS
4	PREPARE INTRODUCTORY PACKETS AND NEEDS ASSESSMENT	COMMITTEE MEMBER + WE COORDINATOR	FEB 15 TO FEB 28	5 HRS
5	PREPARE NOTEBOOKS FOR TRAINING	FACILITATOR + SUBCOMMITTEE + RESOURCE DEVELOPERS/ WRITERS	FEB 18 TO MARCH 19	TO BE DETERMINED
6	SEND INVITATIONS AND INTRODUCTORY PACKETS	FACILITATOR + WE COORDINATOR	END OF FEB	2 HRS
7	PILOT MENTORING PROGRAM	FACILITATOR + SUBCOMMITTEE	APRIL	

No	WHAT	WHO	WHEN	HOW LONG
	7.1. TRAINING AND MATCHING	FACILITATOR + SUBCOMMITTEE		5 HRS
	7.2. MENTORING	MENTOR/PEER	APRIL - JUNE	20 HRS
	7.3. SUPPORT PAIRS	FACILITATOR	APRIL - JUNE	10 HRS
	7.4. REUNION AND EVALUATION	ALL	JUNE 25	3 HRS
8	EVALUATION OF PILOT STAGE, IMPROVE DESIGN, IDENTIFY AND COMMUNICATE POLICY IMPLICATIONS	FACILITATOR + SUBCOMMITTEE + VOLUNTEER PAIRS	JULY	3 HRS
9	BRIEFING AT LARGER DOE/SABES MEETING	SUBCOMMITTEE	AUGUST	2 HRS
10	PLANNING OF FUTURE INITIATIVES	DOE/SABES	MARCH AND AUGUST	?

- ☐ The committee also clarified that participation in the pilot should be voluntary.
- ☐ Underlying the plan was the belief that mentors and mentees should commit themselves to
 - **Completing a Needs Assessment Form;**
 - **A five-hour orientation/training session (April 15, 1993);**
 - **Twenty hours of meeting time between mentors and mentees (April 19 - June 25);**
 - **A three-hour reunion/evaluation session (June 25);**
 - **Interacting with the Project Facilitator for their Support Needs.**
- ☐ Interested mentees and mentors were then asked to identify their strengths and areas for improvement using the following form. Based on the form the Facilitator matched mentors and mentees. Below is a copy of the needs assessment form:

MASSACHUSETTS DEPARTMENT OF EDUCATION
NATIONAL WORKPLACE LITERACY PROGRAM

MENTORING PILOT PROJECT

Please check the answers that come closest to how you feel about the topics below.

PART 1: INTEREST AND COMMITMENT

- I am aware of the commitment involved in the Mentoring Project and want to participate as a

___ mentor

___ mentee

- I don't want to participate at this time because _____
-

PART 2: NEEDS AND AREAS OF EXPERTISE

- As a mentor, I feel confident about mentoring someone in the areas I have checked:

- ___ conducting team meetings
- ___ conducting task analyses, literacy analyses, etc.
- ___ developing curriculum
- ___ involving supervisors
- ___ setting clear goals
- ___ identifying company needs
- ___ finding resources
- ___ evaluating materials collected from company through task analysis, etc.
- ___ involving student- and non-student employees in the program
- ___ identifying committed team members
- ___ educating partners (e.g. management)
- ___ developing individual education plans that integrate learner and company goals
- ___ student outreach, recruitment, intake, and assessment
- ___ moving students out of the program
- ___ the following instructional areas :

___ other:

As a mentee, I would like to be supported in the areas I have checked:

- ___ conducting team meetings
- ___ conducting task analyses, literacy analyses, etc.
- ___ developing curriculum
- ___ involving supervisors
- ___ setting clear goals
- ___ identifying company needs
- ___ finding resources
- ___ evaluating materials collected from company through task analysis, etc.
- ___ involving student- and non-student employees in the program
- ___ identifying committed team members
- ___ educating partners (e.g. management)
- ___ developing individual education plans that integrate learner and company goals
- ___ student outreach, recruitment, intake, and assessment
- ___ moving students out of the program
- ___ the following instructional areas :
- ___ other:

OVERVIEW OF TRAINING

UNDERLYING ASSUMPTIONS

- UNDERSTANDING 1** The ultimate goal of staff training and development in workplace education is to enable workplace educators to better meet the needs of learners.
- UNDERSTANDING 2** Staff training and development for workplace education is more than training teachers for their roles. It is about nurturing the growth of workplace educators who are knowledgeable in the wide range of issues. It takes a holistic view of the workplace environment and the roles of people in it.
- UNDERSTANDING 3** Mentoring is only one way to meet the staff training and development needs of workplace educators.
- There are numerous other options, two of which are currently supported by the Department of Education in a formal manner: a mini-course and an agency-based orientation and staff development program.
- UNDERSTANDING 4** Staff training and development models/options are overlapping and should be viewed as inter-related, not as isolated activities.
- UNDERSTANDING 5** The collegial nature of the mentorship model makes it particularly well-suited to addressing individual practitioner and program needs and to explore the more subtle and complex issues in depth.
- UNDERSTANDING 6** The relationship between mentor and mentee is a formal one, with a beginning and an end.
- The mentor will be one practitioner experienced (the mentor) in one specific area of workplace education with one or more practitioners (the mentees) less experienced in the specific area. Other configurations are possible besides pairs.
- UNDERSTANDING 7** The mentorship model, as it is defined in this context, includes an orientation to the relationship for both mentors and mentees, on-going support for mentor/mentee(s) partnerships, an evaluation of the experience, and the identification and training of new mentors from the current group.

- UNDERSTANDING 8** Partners in the mentorship model will make choices about what areas they would like their joint work to focus on and determine how. Options will be explored during the orientation session. The needs of the mentee(s), however, will drive the determination of content and will facilitate matchmaking.
- UNDERSTANDING 9** It is understood that participants in staff development activities (both mentors and mentees) are equal partners from the perspective of the Department and S.A.B.E.S. (System for Adult Basic Education Support) in exploring and evaluating the effectiveness and feasibility of mentoring as a staff development option for workplace education.
- The input of all participants will be sought on the design, implementation, and effectiveness of mentoring. Participants will make recommendations and suggest revisions of the pilot program and clarify the place of mentoring in and its link with the array of staff development models that are currently available such as mini-courses and agency-based orientation programs.
- UNDERSTANDING 10** Participation in the mentoring program is voluntary.

TRAINING PARTICIPANTS

PARTICIPANTS

MENTORS	MENTEES
Lloyd David Continuing Education Institute 35 Highland Circle Needham, MA 02159 (617) 449-4802	Kevin Geary Lawrence Adult Learning Center Key Polymer Aratex Services 243 South Broadway Lawrence, MA 01843 (508) 975-5922
Bob Bozarjian Adult Education and Community Services, The Commonwealth of Massachusetts, Department of Education 350 Main Street Malden, MA 02148 (617) 388-3300 X350	Arthur Goodall Ken Russell Fred Carley Action Public Schools/ The Haartz Corporation 16 Charter Road Acton, MA 01720 (508) 264-4700
Darlene Nicgorski Ames Safety Envelope Co. 29 Properzi Way Somerville, MA 02143 (617) 776-3360 X616/X309	Robin Kacprzicki Mount Wachusett Community College General Electric 444 Green Street Gardner, MA 01440 H (508) 886-4810 W (508) 537-4811 X348
Katherine Archer Continuing Education Institute 35 Highland Circle Needham, MA 02159 (617) 449-4802	Toni Brennan Mount Wachusett Community College General Electric 444 Green Street Gardner, MA 01440 (508) 632-6600
Tricia Keane Jostens, Inc. P.O. BOX 210 Attleboro, MA 02703 (508) 222-6730 X1217	ALTERNATE

TRAINING AGENDA

TRAINING AGENDA

ACTIVITY 1	Overview of Agenda Logistics of the Day Introductions Donna Curry, Facilitator	9:00 am
ACTIVITY 2	Summary of Grant Stipulations Overview of Staff Development Pilot Programs Assumptions Underlying Training Bob Bozarjian, Johan Uvin, Massachusetts Department of Education	9:25 am
ACTIVITY 3	Roles and Expectations Donna Curry, Facilitator	9:45 am
	BREAK	10:25 am
ACTIVITY 4	Not Being Judgemental Respecting Each Other Problem Solving Donna Curry, Facilitator	10:40 am
	LUNCH BREAK	11:40 pm
ACTIVITY 5	Identifying Strengths Identifying Resources Active Listening Skills Donna Curry, Facilitator	1:00 pm
ACTIVITY 6	What Mentors and Mentees Do Donna Curry, Facilitator	1:50 pm
ACTIVITY 7	Recap and Evaluation Johan Uvin, Massachusetts Department of Education	2:30 pm

TRAINING PLAN

Activity 1 Agenda, Logistics and Introductions

Time	25 Minutes
Who	Donna Curry, Facilitator
Materials	✓ Newsprint listing Agenda for day (post ahead of time) ✓ Handouts of Agenda on 3-hole paper that can go into notebooks (pass out ahead of time) ✓ Tape ✓ Tent card for name tags/markers ✓ Notebooks
Objectives	Participants will ✓ know agenda for day ✓ learn each other's names and programs ✓ learn why everyone is here
Steps	Welcome all participants. Give your name, explain that you will be the facilitator today and the day-to day coordinator of the mentor pilot, and that you'd like to start the day by going over the agenda and then having people introduce themselves. Agenda. Point to the agenda, read it to the group, explaining a little about each item. Ask for questions. Have people open notebooks. Explain that much of what you will do today is in the notebook, so they can take notes right on their handouts. Introductions. Explain that you're going to ask each person to say their name, program they work in, job, and one or two sentences about why they're here--as broad or specific as they want to be...there's no right answer. Explain that, as you pointed out in the agenda, there will be a more thorough "get to know" activity later in the day, but as a start you want to hear why people are here. Rather than go around the room, ask who wants to go first...let others follow at random. (Take notes on what people say but don't put it on newsprint..too intimidating for first event.) Go over logistics (bathroom location, snacks, lunch) Answers will probably fall into two categories--very specific, such as "I want a mentor who will show me how to develop integrated curriculum"

to a broader view, such as "I have always been interested in mentorship as integral to professional development and was excited when I heard of this pilot..."

After everyone has spoken, reiterate the themes you heard. Point out where connections will be made during the day.

Activity 2 Overview of Grant/Staff Development Pilots/This Pilot/Underlying Assumptions

Time	20 Minutes
Who	Bob Bozarjian, Johan Uvin
Materials	✓ Newsprint with Visual of Flow of Pilot ✓ Tape ✓ Overhead Projector ✓ Transparencies w/ background information
Objectives	Participants will ✓ Understand the context in which the pilot was developed ✓ Understand the underlying assumptions behind the mentorship model ✓ See themselves as part of the developmental process
Steps	▪ Explain the grant, staff development pilots, this pilot, underlying assumptions. Ask for questions. Point out in notebooks where information (underlying assumptions, schema of pilot with dates) are. ▪ Point out that they will become part of the group of experts on mentoring. It will be valuable for them to keep notes on what worked and what didn't over the next few months.

Activity 3 Roles and Expectations

Time	40 Minutes
Who	Donna Curry, Facilitator
Materials	✓ Newsprint labelled: "Mentor Role", "Mentee Role", "Expectations of Mentors" ✓ Tape ✓ One or two extra markers "Expectations of Mentees"
Objectives	Participants will ✓ clarify their ideas about what their role is ✓ clarify their expectations of their partner's role ✓ understand that the mentorship relationship we advocate is one that builds from the strengths of both players
Steps	■ Explain that you are going to do an activity to clarify the roles of mentor and mentee, but before you start you want everyone to take a couple of minutes to think back to a mentorship relationship they have been in--it could have been a formal relationship, for example if you were assigned a "buddy" when you began a new job-- but more likely it was informal, the kind of mentoring you didn't realize you were getting until after the fact. Explain that you don't have time to hear from everyone, but you would like three or four people to share their memories. Do that. ■ Ask if, in general, people's memories are positive. ■ Explain that now it's time to think concretely about your roles as mentors and mentees, and your expectations of your partners. To do this you'll get into two groups, mentors and mentee. Each group will list their ideas about their roles and the expectations they have of their partners. There are no right or wrong answers. Then, the groups will come together and see where there is congruence and divergence. You'll talk about divergence.

- Give each group appropriate newsprint and markers. Give them 15 minutes to make their lists (It would be great if they could be in two different rooms for this)
- Bring groups back together and post lists. Ask people to look for congruence. Highlight the congruences. Then have people look for divergence. Ask why these expectations might be so different. How could pair members resolve those differences? Point out that after lunch they'll do an activity in which they look at ways to structure the mentoring relationship, including logistics and limits--you hope that much of the divergence is worked out in those planning sessions.

MENTEE EXPECTATIONS
(INPUT FROM PARTICIPANTS)

- . A good listener
- . Support
- . Matched with someone with real experience in developing workplace curriculums
- . Communicate social/political structure of the organization
- . More than just a "classroom" teacher
- . Guidance/direction
- . Resources, especially materials
- . Mentor to visit sites
- . "Hands-on" involvement with what I'm trying to do
- . Respect of/for mentor
- . Want someone with experience in the workplace, not a "bureaucrat"
- . I don't want the philosophy. I want the reality.
- . Frank feedback from mentor
- . On-going problem solver
- . Enthusiasm

MENTEE ROLE

(INPUT FROM PARTICIPANTS)

- . Be a good listener
- . Be a good communicator
- . Have a good sense of reality
(Don't impose our values)
- . Flexibility
- . Be experimental
- . Trust
- . Humility
- . Accept/offer frank feedback
- . Be responsible in relaying information regarding our situation/surroundings/goals
- . Enthusiastic recipient of advice/suggestions (Be open)
- . Non-defensive
- . Take constructive criticism
- . Offer introductory visit to my sites
- . Goals within context of company's expectations

MENTOR EXPECTATIONS
(INPUT FROM PARTICIPANTS)

- . Greater growth professionally
- . Provide guidance
- . Resource, collaboration (Relay experience to other situations)
- . Relationship, network opportunity
- . Give and take
- . Facilitate sharing information
- . Want something positive to emerge
- . Need to know expectations
- . Commitment
- . Providing/echoing -- sounding board

MENTOR ROLE

(INPUT FROM PARTICIPANTS)

- . Provide guidance
- . Relationship--non-judgmental
- . Resource person
- . Dealing with/exploring information
- . Facilitator/time keeping
 - Listening (Listener gets better service)

Activity 4 Not Being Judgmental, Respecting Each Other, Problem Solving

Time	1 Hour
Who	Donna Curry, Facilitator
Materials	✓ 5 Case studies photocopies on 5 different colors of papers so you can see who has what ✓ Newsprint with Steps and Sample Non-Judgmental Language: <i>Read, think: What is going on? and What, if anything, sh/could be done to change situations? Present your ideas about what is going on, ask about your partner's thinking, develop a shared response to the questions, write it on newsprint for others to read..."Tell me more about how you see this...I never thought of it from that perspective, I'm curious about your thinking there...</i> ✓ Newsprint ✓ Markers ✓ Tape
Objectives	Participants will ✓ Practice non-judgmental approaches to conversations ✓ Become aware of some issues that can arise in mentorship relationships ✓ Develop strategies to handle issues that arise
Steps	■ Explain that the 'experts' stress mutual respect, the ability to problem solve, and a non-judgmental attitude as key to mentor relationships. The next activity is designed to give people practice in addressing issues in a non-judgmental way. ■ Explain that you're going to have people work in pairs: mentorship pairs, and the mentors-in-waiting will be paired with each other. Display newsprint and go over steps. Each pair will be given two of five case studies to read (they will have a chance to look at them all at the end). After each one, they should take a few minutes to think about these questions: What is going on? What, if anything, sh/could be done to change the situation?

Then each of the pair members should present their ideas on what is going on and what, if anything, should be done to change the situation, to their partner. They should explore each other's ideas on what is going on, seeking to learn more about them rather than to convert or persuade. They should try using language such as that listed on the newsprint. After they both understand each other's view, they should note their views on newsprint. They don't have to reach a consensus, but their views should be better informed than if they were each were working alone. Then they should discuss strategies to handle the situation/s--which strategies would they feel most comfortable with? Why? Put response on newsprint. Tape the case study to the newsprint.

- **Carry out the same process with the next case study:** read, think, share views, work to understand each other's views, make final decisions about what they think was going on in the situation and strategies to deal with it. Note them on newsprint. They'll have 15 minutes to complete each case study. You'll keep them informed of the time. If they finish quickly, they can get another case study to do, but they shouldn't feel pressured to do so.
- **Have the pairs post their results** after they've completed their discussions. Have everyone get up and silently read work the other pairs did.
- **Bring the group back together.** Ask them how they felt about trying to understand their partner's thinking. Did they find themselves consciously using language that was different than they might have normally used? What sort of phrases did they use? How did it feel? How do they think it relates to their mentorship relationship?
- **Explain** that you're going to leave the rules of thumb up and at the end of the day they will add any that they think of during later activities.

BREAK FOR LUNCH 1 HOUR

CASE STUDY #1

Joe is a mentor. Kathy is a mentee.

When Joe and Kathy first met, Kathy explained to Joe that she felt that her greatest weakness was her difficulty in recruiting students. Joe gave Kathy several suggestions which Kathy tried to implement.

After several meetings, Joe determined that Kathy's real issue was her inability to establish effective, credible communication with supervisors.

What is happening here ?

What suggestions do you have for Joe ?

What suggestions do you have for Kathy ?

CASE STUDY #2

John is a mentor. David is a mentee.

John and David have worked together for about a month. The last time they talked, John gave David good advice on how to handle some sensitive negotiations over release time. When John asked David how the negotiations went, he was surprised to find out that, although David seemed happy with the results, he had not relied on John's advice. "Your ideas really helped me think through," David said. "Let me run this other issue by you ..." John said "Sure," but realized he was feeling a little disgruntled.

What is happening here ?

What suggestions, if any, do you have for John ?

What suggestions, if any, do you have for David ?

CASE STUDY #3

Mary Jane is a mentor. Susan is a mentee.

In their first meeting, Mary Jane and Susan agreed to talk on the phone once a week and to set up a series of 10 visits, five at Susan's site, three at Mary Jane's, and two off site. The first phone call went very well. Mary Jane had left her calendar at home, so they couldn't set up their first few meetings. She planned to call Susan back the next day, but didn't get to it. Over the next week, Susan left four messages for Mary Jane, but didn't hear back from her. Their second weekly phone call seems to have fallen by the wayside. Susan is concerned because her calendar is beginning to look very full.

What is happening here ?

What suggestions, if any, do you have for Mary Jane ?

What suggestions, if any, do you have for Susan ?

CASE STUDY #4

Barbara is a mentor. Don is a mentee.

Barbara has noticed that Don is very outgoing. He strikes up conversations with people everywhere he goes, whether he knows them or not. When they met at a coffee shop, Don engaged in a long banter with the waiter, which left Barbara feeling slightly uncomfortable. In fact, it always takes Don a little while to focus in on the issue, even on the phone. The last phone call they had took twice as long as Barbara felt it should have.

What is happening here ?

What suggestions, if any, do you have for Barbara ?

What suggestions, if any, do you have for Don ?

CASE STUDY #5

Dawn is a mentor. Terry is a mentee.

Dawn and Terry have met three times so far. Each meeting seems to have gone well. At the last meeting, Dawn suggested that Terry put together a rough draft of a syllabus for a math class that would include several of the quality tools used by workers on the floor. Dawn and Terry are scheduled to meet today, but Terry calls to cancel. When Dawn asks Terry if he has completed his draft, Terry hems and haws and finally blurts out that he has no idea what a Pareto chart, a histogram, and other quality team tools are.

What is happening here ?

What suggestions, if any, do you have for Dawn ?

What suggestions, if any, do you have for Terry ?

CASE STUDIES

INPUT FROM PARTICIPANTS

CASE STUDY 1

Group I

What is happening here?

Joe is being judgmental and neither has sought other available resources to address.

Suggestion for Joe:

- . Help Kathy identify and meet the other players

Suggestion for Kathy:

- . Get a bigger/better picture of where her program fits in the company

Group II

What is happening?

Kathy's issue from Joe's perspective:

Kathy's inability to communicate effectively with supervisor is a barrier to implement the suggestions they decided to pursue

Descriptive information:

- . Kathy has a communications need
- . Joe and Kathy responded
 - Collaborate-- > Suggestions
- . Kathy tried
- . Suggestion didn't work
- . Joe has an opinion about why

Suggestions for Joe:

- . Ask Joe how he concluded she was an ineffective communicator
- . Ask Joe to ask Kathy to describe what happened/investigate if Kathy indeed committed the necessary time to negotiate some appointment with supervisors and sought their

opinion. Ask Joe to name issue (enrollment is down) and clarify why (is there buy in?)

- . Ask Joe to come up with come up with a joint solution; adopt it as "equal partnership" project/do things together

Suggestions for Kathy:

- . Same as above (She shares what was done)

Group III

What's happening?

Kathy has weakness in recruitment

Suggestion for Joe:

- . Joe should have investigated cause of weakness

Suggestion for Kathy:

- . Kathy, Joe, and supervisors need to address the recruitment process

Group IV

What is happening?

Joe has taken his mentor role too far. "How did he determine what Kathy's real issue was?" Shouldn't the two of them have worked together to find what the REAL issue is?

Kathy seems to be taking full responsibility for recruitment.

Joe should be helping her solve the problem, not make the decision.

Suggestions for Joe:

- . Get off his high horse
- . Involve Kathy more
- . Assist her in problem solving
- . Assist in possible solutions to both "her" weakness (as she perceives it) and the "real" problem

Suggestions for Kathy:

- . Ask for clarification in Joe's determining the problem
- . Be less willing to blame herself
- . Ask Joe not to be so dominant, in a very nice way

CASE STUDY 2

Group I

What is happening here?

John's feelings are hurt

Suggestion for John:

- . Air out his feelings or cool it

Suggestion for David:

- . Should have called sooner

Group II

What is happening?

John should not have his feelings hurt; he needs to understand his role.
John has a big ego

The real issue: Not clarified expectations well. John needs to understand that there are many possible solutions to a problem and that David hit a good one. John expects different things from the relationship than David

Suggestion for David:

- . Clarify how discussion with John helped: If David wants to preserve the relationship, he should communicate with John that the discussion was valuable because it catalyzed farther thought in solving a problem successfully

Suggestion for John:

- . Clarify expectations

Suggestions for both:

- . Talk it out
- . (John) Pontificator > < Sounding board (David)

Group III

What's happening?

John's ego was hurt because David didn't use his advice

Suggestions for John:

- . Realize he should learn from David
- . Find out, ask, what David did that worked and why he (David) didn't go with John's advice
- . Acknowledge that he was feeling uncomfortable or disgruntled

Suggestion for David:

- . David could explain what he did that was successful and why he felt David's advice won't work in his situation

CASE STUDY 3

Group I

What's happening?

It's NOT happening!

- . The mentor is not involved--we don't know what's happening with her
- . The mentee is phoning to no avail

Suggestions to Mary Jane:

- . Communicate with someone in project
- . Get in or get out

Suggestions to Susan:

- . Get back to the project coordinator
- . Communicate the problem

Group II

What's happening?

Mary Jane is not active in mentor fashion

Suggestion to Mary Jane:

Mary Jane needs to call back

Suggestion to Susan:

- . Susan should go to supervisor and say this relationship will not work

Group IV

What's happening?

It sounds like Mary Jane is not committed to the program--or not responsible, not organized--overwhelmed (right now)--give her the benefit of the doubt

Suggestion for Mary Jane:

- . Call Susan today. Explain why she hasn't responded. If you can't do it, get out so Susan can get someone else.

Suggestions for Susan:

- . Call Donna Curry and ask for help
- . Leave message with Mary Jane that it is OK to get out if she can't do it right now

CASE STUDY 4

Group I

What's happening?

Barbara and Don have different agendas

Suggestions for Barbara:

- . Prepare a task list before meeting Don
- . Meet in an isolated spot
- . Remind Don of the task at hand

Suggestions for Don:

- . Come prepared to the meetings
- . Be aware of time constraints
- . Grow up!!

Group II

What's happening?

Personality traits (Don's) are a major problem

Suggestions for Barbara:

- . Barbara should consult supervisors about the situation. She should suggest this in not in the realm of mentor-mentee relationship

Suggestion for Don:

- . Don should seek professional assistance. He will not be successful with any endeavor

CASE STUDY 5

Group I

What's happening?

Bad communication

Dawn is not in touch with Terry's knowledge level

Terry is experiencing fear

They do not have a "trusting" relationship, otherwise they would have shared sooner

The program will suffer because of missed time frame

Suggestions for Dawn:

- . Use more sensitive language than "Have you completed the draft?"
- . Dawn should have checked more often on how Terry was doing and progressing. Finding out the day of the meeting is too late.
- . Dawn could come down to Terry's level and reduce the space between them
- . Dawn should apologize for not realizing Terry did not have the skills. She should have asked for his questions and clarification at the start, i.e., skills

Suggestions for Terry:

- . He needs to make Dawn aware sooner
- . He could have gone to other resources for help with the skills
- . He should have called sooner
- . He should be more open and honest with his needs

Group II

What's happening?

There is a communication problem

Suggestion for Dawn:

- . Dawn should ask Terry for more input

Suggestion for Terry:

- . Terry should have let Dawn know he didn't have the knowledge or understanding of quality tools

RULES OF THUMB

- ☞ Confirm everything you hear
- ☞ Clarify what you hear; ask questions or restate
- ☞ Use non-verbals: smile, make eye contact, have your body face the speaker
- ☞ "Fishbone" by effective listening--clarify by asking related questions which allows you to play to a person's strengths
- ☞ Assess the situation; react appropriately according to each individual situation
- ☞ Bring personal "stuff" into conversations
- ☞ Ask relevant questions; suggest possible solutions; compare
- ☞ Be attentive
- ☞ Spend time getting clarity on what you want out of the session
- ☞ Keep things simple; state simply; keep questions in bounds
- ☞ Agree on problem-solving strategies
- ☞ ...

Activity 5 Identifying Individual Resources, Strengths and Listening Skills

Time	50 Minutes
Who	Donna Curry, Facilitator
Materials	✓ Newsprint with list of mentor/mentor/mentee triads on it ✓ Newspaper with list of guide questions on it. ✓ Tape ✓ Blank newsprint ✓ Marker
Objectives	Participants will ✓ get to know partners better ✓ practice listening skills
Steps	■ Explain that a group of experts on mentoring was convened to help design the training and that they stressed the role of listening skills as key in mentorship relationship. Both partners need good listening skills. The next activity has a dual purpose: to enable pairs to get to know each other better, and since the focus is on working from strengths, to get to know the strengths of pair members better, and to give them the opportunity to practice their listening skills. ■ Tell participants that since there are back-up mentors, and since this kind of listening activity is best done in triads, we're going to put people in groups of three, one mentee and two mentors. Ask people to rearrange themselves in those triads. Post prepared newsprint with triad lists on it. (People should know who their tentative partner is before the training so this shouldn't be the big shock of the dating game) ■ Explain you are going to have a pair interview each other, finding out what his/her strengths and areas of expertise are. (You'll have plenty of time to see what areas you want to work on later, right now we want to work from strengths and also see what resources we as a group have). Ask then to include something out of the realm of work as well as workplace ed related. They will have only 7 minutes to do the interview, repeat back, and clarify.

- The interviewer should not take notes, but the observer can. After the interview is finished, the interviewer should repeat what s/he heard. The observer can then correct. (Facilitator: keep them on track by announcing time to switch roles).
- Have pairs switch roles and do the whole thing again; then again, so each person has been talker, listener, and observer.
- The speaker brings the whole group together, after doing it 3 times. Have people share one or two strengths about the person they listened to and you've heard from everyone about everyone, point to the list of resources and comment about what a rich group this is.
- Ask about the listening aspect of the activity: What did it feel like to listen and recall without taking notes? What did they learn from it?

Activity 6 So What Do We Do As A Mentorship Pair?

Time	40 minutes								
Who	Donna Curry, Facilitator								
Materials	✓ Newsprint with framework ✓ Clean newsprint ✓ Two sample "learning style inventories" filled out (enough copies for everyone) ✓ Tape ✓ Markers								
Objectives	Participants will ✓ know what to do in their first meeting ✓ set limits on their relationship ✓ have a set of potential approaches to their work together								
Steps	▪ Explain that unlike the mentor relationships you thought about earlier, this mentorship model is based on a structured relationship. You are going to look at the general framework of any relationship, and then suggest some very specific, concrete activities for you as pairs to engage in. ▪ (If you feel comfortable with this...) Share Barbara Garner's view of mentorship: there's a courting/getting to know period that flow into the honeymoon...then along comes your first fight--which, of course, you'll successfully resolve, as you settle into companionship, action and support. First Meeting <table><tr><td>Set Goals</td><td>establish frame work, decide on course of action</td></tr><tr><td>Action</td><td>mix of phone time and meeting time</td></tr><tr><td>Support</td><td>touch base with mentor facilitator</td></tr><tr><td>Closure</td><td>end formal relationship/evaluate</td></tr></table>	Set Goals	establish frame work, decide on course of action	Action	mix of phone time and meeting time	Support	touch base with mentor facilitator	Closure	end formal relationship/evaluate
Set Goals	establish frame work, decide on course of action								
Action	mix of phone time and meeting time								
Support	touch base with mentor facilitator								
Closure	end formal relationship/evaluate								

They've committed to 20 hours of interaction, which does not have to be in 2-hour chunks.

- **Present the following information.** Show people where it is in their notebooks.

goal setting--the mentee should re-clarify what he/she hopes to learn. Provide the form that might stimulate thinking in this area.

What is my learning style? During their first meeting, both mentor and mentee should do the learning style inventory in the notebook to help you understand how you like to learn, and then discuss the results. We say both because you'll be learning from each other, and although the mentor should probably adjust his/her style more to meet the needs of the mentee, knowing how you both like to work will also help you decide on how to structure your activities.

What can mentor pairs do together? Go over list:

- ✓ fun (off site--we encourage you to do this)
- ✓ mentor coaching (classroom visits and feedback)
- ✓ adopt a project together
- ✓ dialogue journals
- ✓ phone calls
- ✓ meetings on site
- ✓ meetings off site
- ✓ other: (get ideas from group)

- **Explain that you want to try going from the abstract--this list--to a concrete example.** Pass out the two learning style inventory samples. Explain that a mythical pair filled this out. Get someone from the group to suggest a "goal" the mentee wants support in. Give the group time to read the learning style inventories, keeping in mind the mentee's goal. Then have them suggest a course of action for the pair. Note suggestions on newsprint.
- **Focus pairs back to the first meeting.** During their first meeting, which will probably take at least a couple of hours, pairs will want to decide and make as specific an action plan as they can on what they will do together.
- **Be clear about what they as a pair will not do, too.** (It might make sense to refer back to the role/expectation lists at this point). You are setting the parameters, and it's important to be as CLEAR as possible up front about what they as a pair are willing/able to do.
- **It's also important that pairs evaluate their relationship as it's happening.** Pairs should be thinking and shortly decide how they want to evaluate their relationships. Have the group brainstorm ways in

which can do this, as pairs and as individuals. Note ideas on newsprint.

- **Have everyone take out calendars, get into pairs, and set a date for the first meetings.**
- **Ask the group what additional support/specific training they think they might need to help them get their mentor relationships going. Remind them that the facilitator will be contacting everyone, and is available as a support. If they can't think of specifics now but do later, they should feel free to call the facilitator with requests/suggestions.**
- **Take notes on any ideas they have without putting them on newsprint.**

AGENDA FIRST MEETING

☐ **Set Goals**

- Discuss Goals and Complete Goal Setting Form
- Complete and Discuss Learning Style Inventory

☐ **Establish Framework and Decide on Course of Action**

- Determine How You Will Meet, When, and Where
- Determine How You Will Work Together
- Determine Who Will Touch Base with Facilitator, How, How Often, and When

☐ **Determine How You Will Evaluate Your Relationship**

- Come to Closure: Set Formal Ending Date
- Identify How You Will Evaluate Your Relationship
- Identify How You Will Generate and Provide Feedback on Your Experience and the Pilot Program at Close-Out Meeting

GOAL SETTING

- ### 3. What 'intangibles' would I like to be exposed to ?

ADULT LEARNING STYLE ASSESSMENT SCALE

Check the appropriate box

Yes No

-
- | | | |
|--|--------------------------|--------------------------|
| 1. I tend to remember faces instead of names | ☐ | ☐ |
| 2. I like to work with people rather than alone | ☐ | ☐ |
| 3. I enjoy working with my hands | ☐ | ☐ |
| 4. I remember things best when I see them in a
book, movie, or diagram | ☐ | ☐ |
| 5. I prefer deadlines when I work | ☐ | ☐ |
| 6. I am good at interpreting body language | ☐ | ☐ |
| 7. I like to learn by hearing an audiotape or lecture | ☐ | ☐ |
| 8. My performance improves if I know my work
will be reviewed or supervised | ☐ | ☐ |
| 9. I remember and think more frequently with
images than with words | ☐ | ☐ |

Check the appropriate box

Yes No

-
- | | | |
|--|--------------------------|--------------------------|
| 10. When I have a lot of work, I prefer to get it done with colleagues | ☐ | ☐ |
| 11. I like to develop a To-Do list before I start | ☐ | ☐ |
| 12. If I lead a group, I like to have goals and content set rather than have them evolve | ☐ | ☐ |
| 13. I am more responsive to an emotional appeal rather than a logical appeal | ☐ | ☐ |
| 14. I respond better to verbal than to visual instructions | ☐ | ☐ |
| 15. I tend to organize my time at work carefully rather than leave parts of the day unstructured | ☐ | ☐ |
| 16. I like having access to supervisors when I have an important task to complete | ☐ | ☐ |
| 17. I prefer to learn difficult things with someone who really knows the material | ☐ | ☐ |
| 18. I remember tasks if I can outline all steps on paper | ☐ | ☐ |

ADULT LEARNING STYLE ASSESSMENT SCALE

Add Your Own

19.

20.

21.

22.

23.

24.

25.

26.

27.

28.

29.

30.

POSSIBLE WAYS TO WORK TOGETHER

- ☛ Phone calls**
- ☛ Meetings on site and/or off site**
- ☛ Mentor coaching: classroom visits and feedback**
- ☛ Dialog journals**
- ☛ Adopt a project together**
- ☛ Fun activities off site**
- ☛**
- ☛**
- ☛**
- ☛**
- ☛**
- ☛**

EVALUATING RELATIONSHIPS

- ☞ Set definable, measurable objectives, i.e., define standard operating procedure for curriculum development
- ☞ To be measurable, ask questions to rate (numerically)
- ☞ Competency-based; can perform at the end of "time"
- ☞ Need to check whether both parties have gotten something
- ☞ Pre- then post-evaluation. Ask the same questions for both the pre- and post-evaluation (do as a whole)
- ☞ Take "expectations" list, see if expectations were met (at the end of June). Take "goal" sheets for comparisons at end (send to Donna when completed). For non-goal outcomes, ask pairs to keep track on-going
- ☞ Feelings should be a part of the evaluation
- ☞ Unanticipated outcomes should be captured

Activity 7 Recap and Evaluation

Time	20 minutes
Who	Johan Uvin
Materials	✓ Newsprint ✓ Marker ✓ Tape
Objectives	Participants will review ✓ vital next steps and information ✓ identify ways to use notebook as a resource ✓ evaluate day
Steps	■ Explain that you want to review the next steps and resources available to everyone. Remind them that they have committed to work together for 20 hours between now and June 25, at which time they'll attend a 3 hour reunion/evaluation. The facilitator is available to give them support and help them find resources. ■ Share with pairs that they'll be receiving in the mail typed versions of the work they did today. ■ Re-post the Rules of Thumb they developed earlier in the day. Have them add any other rules of thumb for mentorship pairs that might have occurred to them. Explain that this list will be typed up and sent to them. ■ Give pairs the opportunity to ask any questions they might have. ■ Ask them to evaluate the training they just went through. Write "worthwhile" on the top left side of a piece of newsprint and "ideas of improvement" on the top right. Ask people to give their views. Record them on the newsprint.

ATTACHMENTS

Sample Goal Setting Forms

Invitation Reunion/Evaluation Session

GOAL SETTING

1. What concrete skills do I hope to learn?

Learning how to establish a GED Program within the context of Workplace Education.

2. What specific information do I hope to gain?

I expect to learn the technical information necessary to establish and continue a GED Program.

3. What 'intangibles' would I like to be exposed to?

I am anxious to discuss the learning styles and pedagogical approaches which, from practice, have proven workable in the GED setting in the Workplace.

GOAL SETTING

1. What concrete skills do I hope to learn ?

What goes into starting an ESL workplace program.

2. What specific information do I hope to gain ?

Intake

Assessment

Curriculum Development

3. What 'intangibles' would I like to be exposed to ?

Dealing with people I will encounter in my site, i.e. managers, foreman, employees, etc.

Discuss possible roadblocks to a successful program

GOAL SETTING

1. What concrete skills do I hope to learn ?

1. Taking information from task analysis and developing specific/relevant lesson plans
2. Learn about different ways to gather information for future development of lesson plans

2. What specific information do I hope to gain ?

1. Specific lesson plans for Key Polymer/Aratex especially in the area of safety.
2. Get materials for developing problem solving skills for employees.

3. What 'intangibles' would I like to be exposed to ?

1. Different problems that have come up in mentor's workplace education experience and solutions that were tried to solve those problems.
2. Ideas / opinions on where "workplace ed" is heading

MEMO

TO: Donna Curry

FROM: Toni Brennan

DATE: May 19, 1993

SUBJECT: Mentoring Project Goals

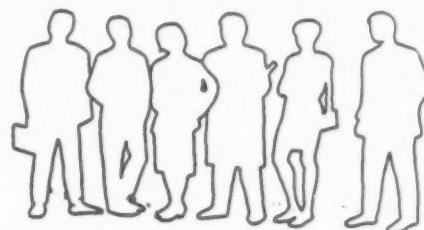
Katherine Archer met today at my workplace site - G.E. in Fitchburg. We agreed on the following as our goal and objectives for the Mentoring relationship.

GOAL - To improve the G.E. Workplace Curriculum

In the development of this curriculum we identified the following objectives:

1. To discuss and answer for ourselves "Who drives the curriculum?"
2. To exchange sample curricula each of us has developed to use as a basis for our ongoing curriculum discussion.
3. To visit each other's workplace program sites. She has made a visit to G.E. On June 10 I will visit one of her Boston programs.
4. Through visits and phone calls advising about workplace culture and the teaching issues related to workplace education. This must include ways to measure, how to develop evaluation tools and how to carry them out. How to make sure we evaluate the program as well as the learner's progress. How to answer if the program as it is designed is serving the interests of both workplace and students.
5. To provide assistance with effective reporting tools, such as graphing information, once preliminary evaluation data is gathered on students who have completed the first ten wk. cycle of classes at G.E.

MENTORING REUNION MEETING



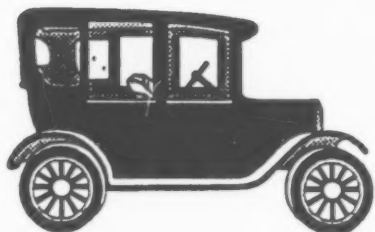
Friday, June 25th

1:00 - 4:00 PM

Northern Essex Community College

Lawrence Campus (Directions enclosed)

Room 144



**You will DRIVE the agenda,
so please be prepared to
share your views on:**

- ✓ **What worked and didn't work**
- ✓ **Whether your goals were met
(Remember your goal setting
forms? !)**
- ✓ **What other outcomes resulted
from this process**
- ✓ **How effective the mentoring
process was**

We look forward to seeing you soon.

Call Donna or Johan if you can't make it

ADDITIONAL MENTORING RESOURCE PERSONS

Fred Ritzau
Personnel Director
United Electric Controls
85 School Street
Watertown, MA 02172
(617) 926-1000

Britt Bergstrom
Commonwealth Literacy Campaign
Department of Education
Bureau of Adult Education
1385 Hancock Street
Quincy, MA 02169
(617) 770-7329

Casey Strumpf
Director of Training and Development
New England Medical Center
11 Nassau Street
Boston, MA 02111
(617) 956-4595

Betsy Nelson/Jill Gerald
Boston Partners In Education, INC.
145 South Street
Boston, MA 02111
(617) 451-6145

Lili Allan
Cambridge Community Services
99 Bishop Richard Allan Drive
Cambridge, MA 02138

Mike Goderre
Digital Equipment Corporation
1 Digital Drive
Westminster, MA 01473-0471
(508) 874-3072